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ABSTRACT

North Dakota Occupational Models have been developed from the practices of actual offices and businesses in the State, duplicating real jobs and work materials and complete with pressure and decision-making activities, to provide realistic work experiences for secondary students who have completed the basic skills courses in office education. A variety of suggestions for orientation, career exploration, and implementation of the occupational model plan are presented in the teacher's handbook. Using instruction packets (kits comprising materials collected from actual businesses) the teacher, in the role of office supervisor, conducts simulations which can substitute for or enrich the cooperative office experience. Thus, teachers wishing to implement a program of occupational models must develop packets relevant to businesses in their own areas. Using the occupational model, office education classes may be organized under the individualized instruction plan, the rotation plan, the battery plan, the supplementary plan (with cooperative work experience), and the full-scale simulated office plan. Tips for various types of organization are offered, and directions are provided for setting up a full-scale simulation. A report of the models' development and brief descriptions of the 24 models are available as CE 004 108. (AJ)

THE NORTH DAKOTA OCCUPATIONAL MODEL

TEACHER'S MANUAL

ED107331

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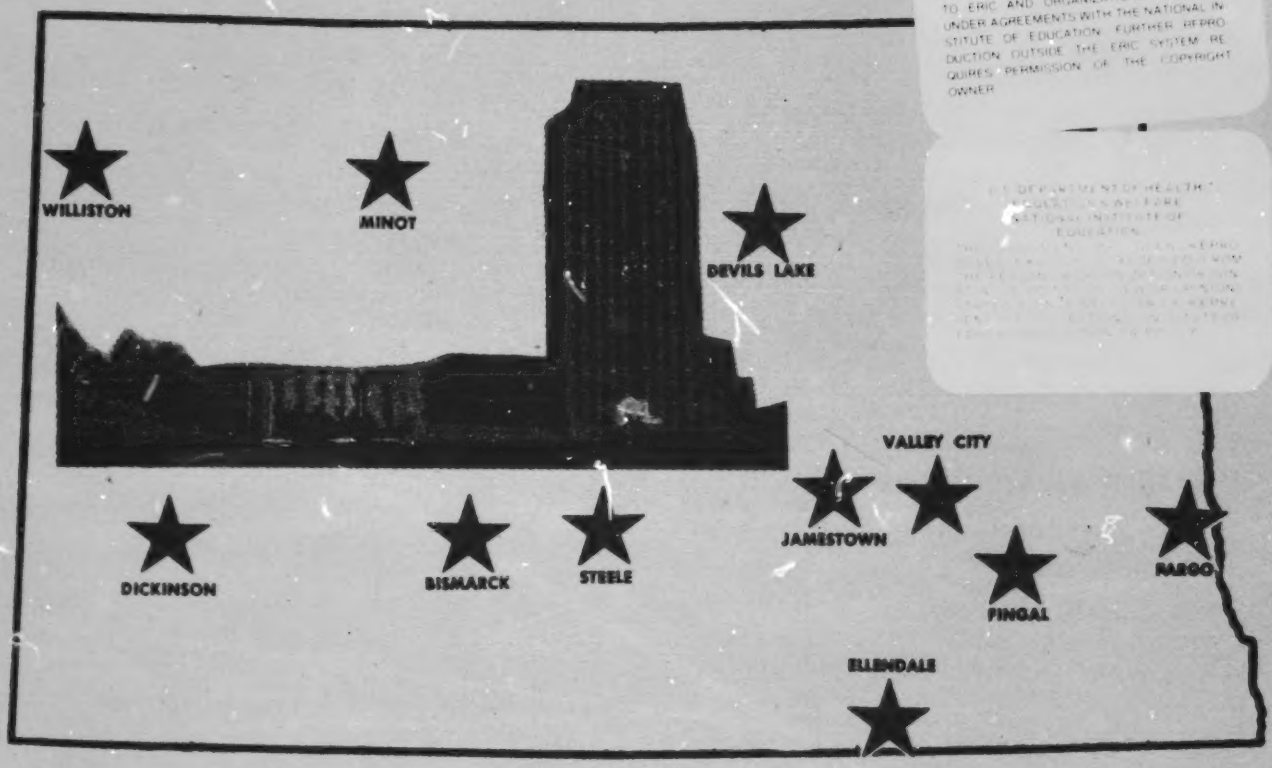

★ Indicates the location of businesses cooperating in developing occupational models

AGRICULTURE **MEDICAL** **EDUCATION**
INSURANCE **BANKING** **GOVERNMENT**
BUILDING AND TRADES
SERVICES

CE004107

ED109371

A HANDBOOK FOR NORTH DAKOTA VOCATIONAL

OFFICE EDUCATION TEACHER-COORDINATORS

NORTH DAKOTA OCCUPATIONAL MODELS

A CAREER CLUSTER CONCEPT

Prepared at the
University of North Dakota
Grand Forks, North Dakota
Department of Business and Vocational Education
Dr. John L. Rowe, Chairman

In Cooperation With
State Board for Vocational Education
Bismarck, North Dakota 58501

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1973

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PREFACE

The North Dakota Occupational Model Plan should provide every student in the state whose career goal focuses on office employment the opportunity to be vocationally prepared for some level of office work.

The achievement and attainment of success in pre-employment training and career exploration of each student is dependent on the innovation, knowledge, skill, and methodology of the individual teacher. Lacking adequate materials, however, even the most resourceful teacher is handicapped.

As a result of the three-year Exemplary Program at the University of North Dakota, funded by a grant from the North Dakota State Board for Vocational Education, learning materials appropriate to an agriculturally dominated state have been developed. A major criterion was established. The materials should be realistic, relevant, and meaningful for students at every ability level. Additionally, the instruction packets should be designed so that they would be used by teachers, no matter what type of program, facilities, or equipment are available. Every teacher should be able to implement the concept--beginners as well as "old pros," innovative and creative, as well as the less resourceful.

After a year of deliberation, argument, frustration, and mistakes, we finally agreed upon an old concept in a new dress. We decided to develop a series of position simulation packets designed in such a manner that students could work semi-independently. We called them OCCUPATIONAL MODELS.

> "An occupational model is a synthesis of activities performed by an office worker in varying sized offices in a single industry."

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CHAPTER I

O R I E N T A T I O N

North Dakota Occupational Models have been developed from actual offices and businesses in the state. They seek to duplicate real jobs and materials of those companies, complete with pressure and decision-making activities. The instruction packets focus on the performance of production projects which take place in the company. Thus the occupational model concept can substitute or enrich the cooperative office experience. Rather than sending the student out on the job, however, the job has been brought to the student.

Many of the principles and procedures detailed in the North Dakota Coordinator's Manual, Vocational Office Education for Tomorrow's World, are applicable in the occupational model plan.

A variety of suggestions for orientation, career exploration, and implementation of the occupational model plan are presented in this book. Each activity cited has been tried and found effective during the field-test experience. No one school has used them all, but every idea presented has been tried in some of the 18 pilot schools, and a number of examples have been used in several programs.

The more closely the teacher intends the occupational model plan to substitute for on-the-job experience, the more he will wish to duplicate the cooperative method. Therefore, frequent references to the ND Coordinator's Manual are included; the citations referring to a particular Phase, Checklist, and Form No.

OBJECTIVES OF OCCUPATIONAL MODEL INSTRUCTION FOR THE STUDENT

1. To integrate previously learned office skills and knowledge which will enable the student to become employable.

2. To acquaint the student with a range of career choices available in North Dakota based offices and businesses.

3. To provide sufficient proficiency so that, once employed, the student may retain and advance on the job.

4. To provide the student with a variety of office positions so that the student may explore and evaluate his career goals in the light of the office cluster.

5. To close the gap between a student's perceptions of office work as a career and the reality as exemplified by North Dakota offices.

OBJECTIVES OF OCCUPATIONAL MODEL INSTRUCTION FOR THE TEACHER

1. Can be used by all business teachers in the state.

2. Are appropriate for complementing, supplementing, or substituting for cooperative work experience programs.

3. Are appropriate for complementing and supplementing the education and training students have received in basic skill courses.

4. Are appropriate for complementing and supplementing occupational guidance (career exploration within the office cluster); so that the teacher has meaningful materials with which to expose students to a variety of companies. Teachers can instill an understanding of the employment opportunities within the state, as well as helping students gain an awareness of what they want to do, and don't want to do.

METHODS OF IMPLEMENTATION

Office education classes using occupational models may be organized under the individualized instruction plan, the rotation plan, the battery plan, the supplementary plan with cooperative work experience, and the full-scale simulated office plan. The career exposure approach is integrated throughout every plan.

Individualized Instruction. The student may work on his own, at his own pace, in the simulated company and on the position of his choice. An advanced proficient student progressing at his own rate, even with the addition of the contingency tasks, might conceivably cover 8 - 10 models in one year (4 - 5 in one semester); while the slower student could be allowed to spend a longer period of time on each model and complete only a few, thus gaining a feeling of successful achievement.

The flexibility of the occupational model instructional plan provides the teacher the opportunity of helping each student achieve according to his own level of interest and ability, and within his particular career goal limitations.

When this plan is implemented, the teacher may find he becomes better acquainted with each student and his range of abilities. This, in turn, should aid the teacher when he is ready to assign--or help the student select--the next model.

Rotation Plan. The average working time for most models is approximately 20 hours--two weeks for a two-hour block program; 4-5 weeks for a 45 - 50 minute, one-hour block program. Therefore, the teacher may wish to keep all students on a regular rotating schedule with a set completion time. With this plan, students work on a certain model for a given length of time and then shift to another model, just as they would in an office machines class.

Battery Plan. All students work on the same model at the same time. Having a number of models of one kind is important in order to implement this concept. The teacher would have to duplicate enough kits for each student, since there must be enough kits for the entire group to operate as a class. This plan lends itself to a "practice set" type experience. During the field test, it was found that students tend more to compete--wondering if they are "keeping up" as fast as others--rather than gaining the office atmosphere concept whereby office employees work on different types of things at differnet speeds.

Supplement to Cooperative Work Experience. Under this plan, a student selects a model that is similar in both company and position to his community work station. The model activity can be conducted either prior to, or concurrent with, the job experience.

Simulated Office Plan. There are a variety of ways this plan can be implemented. To understand the flexibility from the simplified to the complex approach, refer to the section of this book, entitled "Full-Scale Simulated Office," page 55.

Career Exposure Concept. This approach is integrated throughout every type of plan and with every phase.

If a student has a career goal of working in a particular type of industry or business, but does not know what his specific positional aptitude is, he might select several occupational models within one type of company, such as banking, insurance, the medical field, agriculture, and so on, rotating on a variety of position categories.

On the other hand, if the student knows he would like to be a secretary or bookkeeper, but cannot decide what type of office he prefers, he could choose secretarial or bookkeeping position models in several different types of firms and fields.

TIME LENGTH FOR INDIVIDUAL PROJECTS

Occupational model project time estimates (in Supervisor's Kit for all 24 models) are based on the formula that if the actual office worker performed the activity in 45 minutes, the average length of time spent by the student would be equal to two (2) hours. Subsequent to the pilot test, some project time estimates were revised. It was found that the first two or three projects of any given model take the new employee a little longer to complete. Once he is familiar with the job, he will generally work through the given projects at a faster rate.

Both teachers and students are accustomed to classroom projects that fit neatly into a class period and/or designated time slot. Offices do not work this way. A project may last half a class period or may take three or four days to accomplish. A number of model projects are long. Since projects were designed directly from ND office workers' actual duties, in some cases there was no way to limit project length and still maintain realism.

The time estimates in the Supervisor's Kit for each project reflect the average time for students to complete a project. While the teacher occasionally may establish office deadlines to simulate a rush job with selected students, the teacher should not use the time estimate as a classroom deadline. Suggestions for developing the office environment regarding time include:

1. "Leave the job in the office." Students do not use models as homework.

2. Students clear their desks at the end of the work period, realizing that the next day they will continue with incomplete projects.

OCCUPATIONAL MODEL TERMINOLOGY

The following terms are used throughout this book in referring to the occupational model instructional plan.

1. Accept/Reject Form - This form appears in the Supervisor's Kit. It is a checklist for the supervisor to keep a record of each employee's work as he proceeds through model projects.

2. Briefing Sessions - Initial planning sessions. Students brain-storm, plan, implement, arrange, devise, etc.

3. Company Manual - This manual appears in the Employee's Kit only. The supervisor may wish to review this with new employees. It informs the worker of the company's history, purpose, operations, employee policies, organizational structure, and pertinent personnel with whom he will work. Job description and employee qualifications are also included.

4. Contingency - Additional projects, provided to give more realism and perhaps more difficult and in-depth activities to the models. They are located in the Supervisor's Kit, so the employee need never see them unless and until the office supervisor leaves one in the employee's in-basket.

5. De-briefings - Similar to office meetings. Small or large group sessions. Employees engage in evaluation of the office; their jobs; human relations problems; plans, suggestions for change; etc.

6. Employee - (Student) Once "hired," students become employees. Teachers are encouraged to look upon their "former" students as office workers; and to also encourage workers to consider one another as "fellow employees."

7. Employee's Kit - This contains the Supply List, Performance Goals, a Self-Evaluation form, the Company Manual, the Procedures Manual, and the Employee's Manual (with project instructions).

8. Formative Evaluation - May be objective or subjective; may be graded

or ungraded; may be formal or informal. Basic differentiation between formative and summative is that the formative is an in-process measure of checking where the student is, compared to where he should be. There is still time to provide remedial instruction (for the entire class or with selected individuals). The term, as its name implies, still allows time for further formation of habits, skills, and knowledge.

9. Hired-Fired-Transferred - After a student has applied for work in a particular company and it appears to the teacher this is a good choice, he is "hired" (assigned) to that job. Because of lack of ability, poor attitude, etc. he might be "fired" (removed from the model); or he could be "transferred" to another company or position.

10. In-Service Training - Similar to company on-the-job training sessions. Synonymous with "classroom instruction on OE units." Can be refresher courses or new unit instruction.

11. Internal Office - Office procedures such as central files and supplies, payroll system, etc. Functions with classroom positions; develops interaction among workers, work flow, etc.

12. Job or Position - Synonymous with model. When a student's job or position, for example, is "Bookkeeper in the Nokato State Bank," it means he is working on that particular model.

13. Office - Synonymous with classroom. Once students are hired, they become employees and the classroom should function as an office.

14. Performance Goals - Each model contains its own set of performance goals, located in the front of the Employee's Kit. The teacher might wish to allow students to look these over before they "apply for work." Both employee and supervisor may use these goals at the end of the model as an evaluation guide in considering whether the employee has accomplished the goals of this work position.

15. Procedures Manual - This manual appears in the Employee's Kit only. The supervisor will want to have a general knowledge of its contents. This manual contains all the information the employee should need to understand his job. It simulates the company files, or details that a fellow employee would share with a new member of the team during an "orientation to the job" session. When in doubt, the employee should always consult his Procedures Manual before asking questions of either the office supervisor or a fellow worker.

16. Project - Individual activities which the employee must perform in his job. These may be daily routine tasks, duties that are integrated with other duties, or isolated one-time-only responsibilities. Each model contains from 10-20 projects, depending on the difficulty and length of the projects included in that position; as well as the ability level of the model.

17. Self-Evaluation Form - This form is located in the Employee's Kit, directly behind the Performance Goals. The teacher may not always wish the student to evaluate himself. If so, however, the employee should look over the performance goals upon being hired, project his own goals for this job, and subsequently evaluate himself at the end.

18. Subjective Evaluation Form - This evaluation sheet is provided in the Supervisor's Kit so that the supervisor may evaluate the employee's performance in terms of attitude, cooperation, attendance, use of supplies, etc.

19. Summative Evaluation - A summing up. This may be an end-of-unit test; or an end-of-course measurement of the student's final grasp (or growth) toward the established and expected objectives and standards.

20. Supervisor - (Teacher) The teacher must change roles, even in his own mind. Once the occupational model instruction begins, he is no longer a teacher, but is now the Office Supervisor.

21. Supervisor's Kit - Each model containes two separate parts. One kit for the teacher, and one for the student. The Supervisor's Kit contains evaluation sheets--both objective and subjective--correct forms and copies of correspondence, and other instructions that an office supervisor would otherwise know. Supply lists, supply forms, and contingencies are also included.

22. Transmittal Form - This form is used in nearly every model. (The Telephone Clerk transmits information to the supervisor via the telephone.) It is similar to the "routing slip" used in many offices; however, in the occupational model instruction plan it simulates the action of the employee in distributing completed work. It indicates to whom (or to which department) work is sent once the employee completes the project. Each form should be correctly and completely filled out by the employee so that the supervisor knows the employee understands the correct distribution. In many cases, for instance, a number of correspondence or form copies are prepared; but each copy is transmitted to a different person or department within the company.

23. Working Papers - Incoming mail: forms, sales tickets, checks, bills, invoices, etc. Various calculations and verifications may be performed relating to these materials; or they may be filed following posting and recording procedures. Working papers should be removed from kits, cut to size, and filed in labeled folders or envelopes ready for use prior to model activity.

PRE-REQUISITES

There are basically two pre-requisites for the student entering the occupational model instruction plan:

1. At least a one-year course in typewriting.

2. Office practice units involving: office machines, filing, record-keeping, production typewriting, etc.

Previous instruction in shorthand and bookkeeping is desirable, but not necessary. Machine transcription can be substituted for shorthand dictation; or the teacher may allow the student to type correspondence and reports from rough-draft or script copy.

Models provide a capstone experience. They are <u>not</u> basic instructional texts; nor are students expected to have had all of the prior training needed in order to cope with the model positions. It is the teacher's responsibility through either pre-training, or during interim periods as the need arises, to introduce instruction. This could be done through the presentation of units (see page 19) and can be conducted on an individual or group instruction basis.

Bookkeeping models, for example, contain the job activities themselves, not instructional details. Teachers are encouraged to stress the importance of legible handwriting, the need to keep posting up-dated, procedures for posting to journals and ledgers, etc.

OFFICE EXPERIENCE

After working through various occupational models, the student will have gained experience in the following office skills as they relate to specific jobs:

1.	Typewriting:	correspondence, forms, rough-draft, composing, masters
2.	Shorthand:	office style dictation, typing mailable transcripts
3.	Record-keeping:	posting to ledgers, forms, accounts; bank deposits, petty cash, extending invoices, balancing accounts, etc.
4.	Handwriting:	many clerical activities are done in rough draft form with pencil, or final posting with pen.
5.	Machine Dictation & Transcribing:	office-style dictation, machine operation; in some cases will gain experience in actual dictation.
6.	Duplicating:	preparation of masters, stencils, thermofax; reproducing and machine operation.

7.	Office Machines:	adding machines, calculators, reproducing machines, and copiers.
8.	Filing:	alphabetic, numeric, subject, geographic; tickler, preparation of materials, retrieval, etc.
9.	Telephone:	office operation, procedures, techniques, keeping of records pertinent to telephone follow-up.
10.	Mail Handling:	correspondence, distribution, classification, incoming, outgoing, packaging, etc.
11.	Office Supervision:	making own decisions, self-discipline, responsibility, follow through, supervising people and activities.

TEACHER'S PREPARATION

The teacher should:

1. DETERMINE PROVISION FOR office supplies, duplication of needed forms and materials from kits; plus envelopes, carbon paper, copy paper, ditto or stencil masters, duplicating paper, etc. (students, school, class, department provide, etc.) Have these ready for use BEFORE work begins.

2. BE AWARE OF EQUIPMENT NEEDS - Have readily available for employee use, or make prior arrangements for adapting. (copying projects - use of copiers, duplicating equipment, or both)

3. PREPARE WORKING PAPERS - A majority of the models contain working papers.
   (Examples: incoming checks from customers, invoices, receipts, bills, sales tickets, mail, forms and other records)
   Because many of these forms are small, they are printed several to a page.

   In order to provide the employee with a realistic office experience, these forms should be removed from the kits and cut into proper size. They can be filed in labeled packets and made available as required.

   The teacher may use this preparation as a learning experience (filing, etc.) for students prior to model activity. A class other than the OE might be allowed to prepare materials.

4. DETERMINE CORRESPONDENCE-HANDLING PROCEDURE - dictation live, by tape, prepared transcription belts, or prepared rough drafts. (Letters are in Supervisor's Kit)

5. MAKE DECISIONS LEFT TO SUPERVISOR'S DISCRETION - and explain during the orientation period with employees: i.e., as follows:

   a. are carbon copies to be corrected?
   b. how are supplies handled (inventoried, filed, distributed)?
   c. how should projects be transmitted?
      (in-out basket at supervisor's desk/in-out baskets at employee's desks)
   d. what constitutes "Mailability"? (Accept/Reject)
   e. correction method (erasing, liquid correction, etc.)

6. DETERMINE - how many and which evaluation sheets will be used

   a. Self-Evaluation. If used, the supervisor should determine the follow-up procedure.
   b. Subjective-Evaluation. If used, the supervisor should determine follow-up procedure.

c. Employee Check-List (Accept/Reject Sheet). Supervisor uses for checking completed projects.
d. Grading and/or evaluation method.
e. Explain to students and/or let them help decide.

7. CONTINGENCY USAGE - Determine if and how these additional projects will be used. Examples as follows:

a. extra - added at the end of the Model (for exceptional students)
*b. substitute for some other project(s) (any student)
*c. insert as "rush" jobs (any student)

*Simulate "Office Pressure." ADD in the middle of other work, with a rush deadline.
It is recommended that office-pressure deadlines be added only after employees have experienced a degree of self-confidence on their job; and/or with students who evidence the ability to cope with this increased responsibility.

HOW TO ASSUME THE SUPERVISOR'S ROLE

The teacher must "change roles" - even in his own mind.

The teacher is no longer a teacher - but is now the OFFICE SUPERVISOR.

Suggestions for assuming this role:

1. Transmit remarks to employees in person or on the transmittal form.

a. Avoid making corrections for students on correctible copy.
b. Avoid use of a red pen or pencil.
c. If letters and materials have correctible errors, list these on the transmittal form and return to employee for correction.
d. If letters and materials are acceptable (mailable), sign them. (signer may wish to develop a different handwriting for each officer or dictator in the company)

2. Use the Employee Evaluation Sheet, marking the Accept/Reject columns and Remarks column.

3. Indicate on items which have first been rejected that they are corrected and have been accepted.

4. See that employees follow through; i.e., correct errors quickly, prepare materials for mailing, place in out-going mail basket.

5. THINK OF YOURSELF AS THE EMPLOYER. Would you ask employees to use extra supplies and add to the production time in order to have a letter redone when a careful correction would, in fact, make it "mailable."

EXAMPLE: Suggest future changes on the transmittal form. Certain instances may be mailable; however, you want students to use a form or style which is different and preferable to you.

Such as:

Mr. and Mrs. John Jordon
1643 N. Cherry Avenue
Grand Forks, ND 58210

On Transmittal Form you might accept this address style but ask that hereafter the employee type out the word North.

See next page for example.

THE UNITED HOSPITAL

TRANSMITTAL FORM

DATE December 9, 1971

TO Mrs. Ruth Jacobsen

TITLE or DEPT. In-Service Education Coordinator

COMMENTS:

Letter to Portex Division
for signature

(1) Please note that you have spelled February wrong. Correct, & re-submit

(2) Hereafter - please spell out the word North. Do not abbreviate.

FROM (Employee's Name)

TITLE or DEPT. In-Service Secretary

CHAPTER II

SUGGESTED ACTIVITIES

FOR

IMPLEMENTATION AND ENRICHMENT

Full-scale model office simulation, individualized instruction, cooperative work experience complement, career exploration--all have found expression in a program that, through the field-test experiment, seems to have almost endless flexibility.

From initial job applications and interviews, through supervising the student on the job, publicizing the vocational program in the school and community, on to the final evaluation stage, many teachers are already discovering the versatility North Dakota Occupational Models can provide.

Presented on the following pages are many suggested activities. No one teacher or program will want to implement all of them. They are provided for your use because other teachers in North Dakota found them successful.

You, too, will no doubt originate many ways to implement the occupational model plan. Perhaps there will never be two semesters alike. There will surely be no two programs identical in operation.

You need not be concerned that your students are not all vocationally competent when they begin the program. They have the basic prerequisites. The occupational model plan is a learning experience. Though still in the classroom, students are on the job; yet you have full control. Despite all of your preplanning and orientation activities, it may be necessary throughout the program to adjust pre-conceived plans. The occupational model program allows all the flexibility you wish to initiate. Make whatever adjustments seem necessary--and then make them again next month if needed.

PRE-TESTING
SELF-APPRAISAL

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Beginning of Semester OE Class	Simulate cooperative work experience	Students file data sheet with the coordinator	* PHASE IV, CHECKLIST 6, Form B-1
Pre-Testing	Student discovers "where he is." Teacher discovers "where students are."	Suggested testing materials: Civil Service materials General Aptitude Test Battery (GATB) Minnesota Clerical Aptitude Test	* PHASE V, CHECKLIST 12, Form B (See State Employment Bureau) (See guidance counselor)
Evaluation		Students and/or teacher grade tests. Students plot their own scores against the class average.	(See Plot-page 15)
Class Graph	Discovery of individual weaknesses and group weaknesses. Result: teacher plans specific units for use throughout course	Clerical Employment Tests	Some models contain these.
Aptitude and Self-Evaluation	Students discover "likes/dislikes."	Suggested evaluation materials: "Self-Analysis Rating Scale" "Work Attitudes questionnaires" GATB (see above) Minnesota Clerical Aptitude Test	BUSINESS BEHAVIOR, Russon (Southwestern: 1964) pp. 24-25, 46-47
	Learn more about self/jobs	Self-appraisal suggestions	* PHASE VII, CHECKLIST 16, Form A

*Vocational Office Education for Tomorrow's World, North Dakota Coordinator's Manual, Bismarck, ND 1971.

February 5, 19--
PRE-TEST DATE

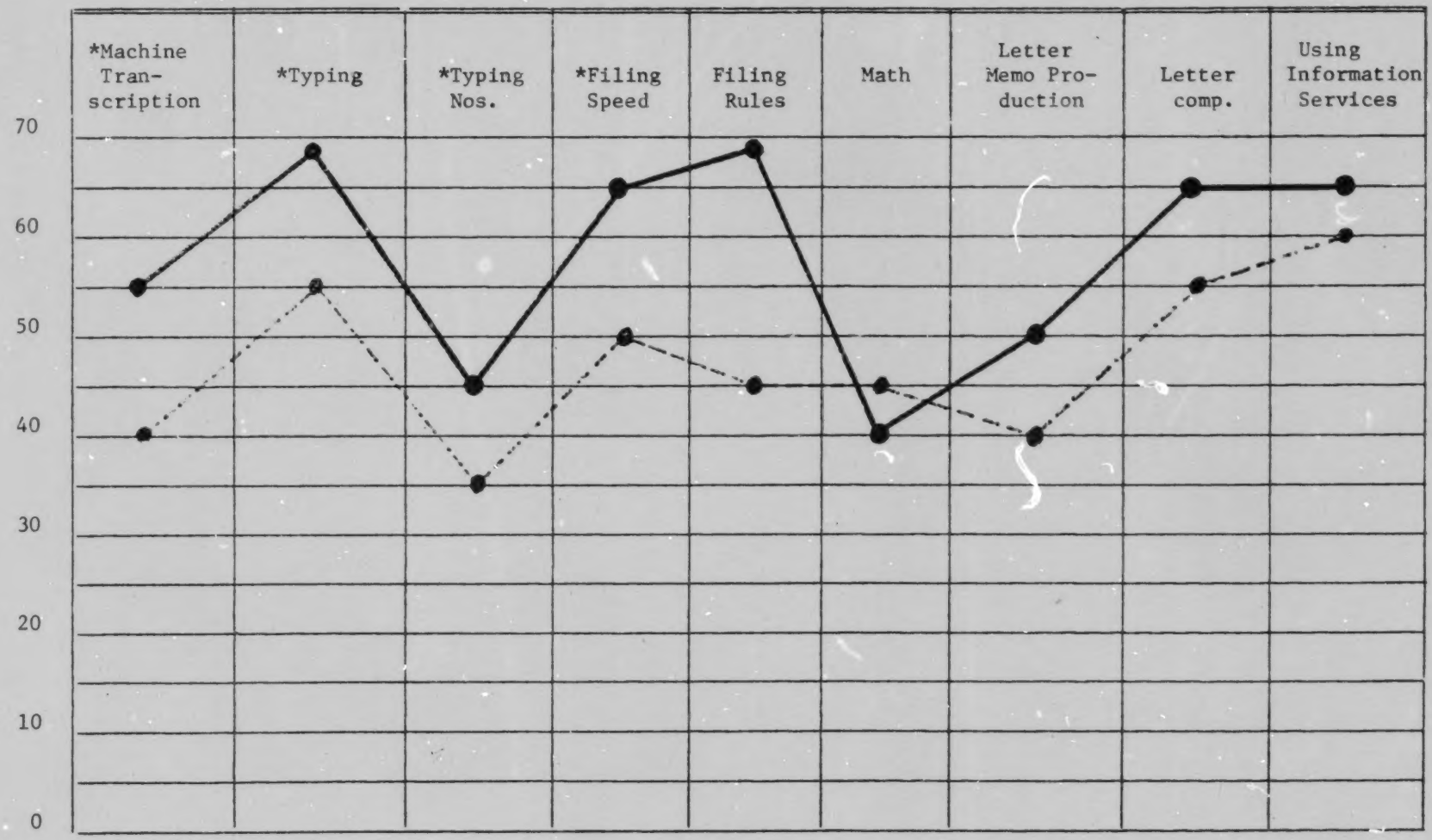
COLOR ——————
(YOUR SCORES)

David C. Churchfield
NAME

POST-TEST DATE

COLOR - - - - - -
(CLASS AVERAGE)

* - TIMED TESTS



CAREER ORIENTATION

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
CAREER exploration	Develop interest in office careers	Students prepare a large wall map (or bulletin board) of North Dakota.	Ask Questions: "Where do you want to apply for work?" "What kind of company?" "What kind of job?" (students refer to self-appraisal)
Occ-Model exploration	Develop interest in occ-model plan	Pinpoint towns where occ-model jobs are located.	Students SEE COMPANY MANUAL, in various occ-model employee kits.
Orientation	Students gain understanding of various office careers and individual interests.	Legend on map: population of town pop. of company list position(s) available	
		Students/teacher prepare "job wanted" ads. A committee could do this, or different students prepare different ads.	Students SEE OCC-MODEL DESCRIPTIONS (rather than entire kits--since they might be looking for a "snap" job.)
		Post ads on bulletin board.	See Ad, page 56.

NOTE: Several activities can be in process concurrently. Or these activities can seem more "special" to the students, and therefore integrated with review and introduction of specialized units.

ORIENTATION TO THE OCCUPATIONAL MODEL PLAN

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Initial Explanation of Occ-Model Plan: *Substitute for Cooperative Office placement *Enrichment to Cooperative Office placement Career Exploration	Give students confidence, and understanding Allow time for questions and answers. Work out details as you go along--with student input.	Pass out Employee Kits--one to each student, or several to each small group of students. Describe the placement and purpose of the Company Manual--to acquaint the new employee with personnel policies and familiarity with "his" company. Describe the placement and purpose of the Procedures Manual--a booklet that simulates the company's files and procedural information; plus details of how to fill out forms, correspondence styles; address list, etc. Explain that individual projects in the Employee's Manual are activities that the office worker would perform. Project instructions simulate an employer's daily work requests. Describe the purpose of In-Service Training, (if used), as a method of "learning and/or reviewing basic skills/knowledge" needed before working through some models. (Advanced or Challenging Models--labeled and described in App. --require above-average proficiency and in some cases, a pre-requisite in bookkeeping or record-keeping).	During the pilot test, those students who gained the most from occ-models were those who had been adequately prepared. (prior to beginning occ-model work) During the pilot test, those students who were taught how to use the Procedures Manual found it most effective. Students must understand that the occ-model kits are NOT text-books, nor practice sets. Detailed "how-to" teaching instructions are not included in projects. The worker must consult the Procedures Manual, a reference book, the Office Supervisor, a co-worker; or make his own decisions.
Objectives, Evaluation, etc.	Students know what is expected of them...objectives, grading and/or evaluation, etc.	Briefings--student can provide input. Describe (and determine--with student input if desired) use of evaluation sheets.	See pp. 36-46 for use of forms and examples.

*See page 18 for report form occ-model workers submitted weekly.

BISMARCK SENIOR HIGH SCHOOL
DIRECTED WORK EXPERIENCE
WEEKLY REPORT

Supervisor's Comments

_____
signature

Name of Trainee _____

Name of Employer _____
(if hired for a special project)

Date		Time In	Time Out	Hours Worked	Work Performed
	Mon.				
	Tues.				
	Wed.				
	Thurs.				
	Fri.				
	Sat.				

Total hours worked _____

New Information I Learned:

_____

_____

_____

_____

_____

I hereby sign this form knowing it is a true description of my work.

_____
Student's Signature

OFFICE EDUCATION UNITS

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Brush-up, Review	Prepare for work on Occ-Models	* Drill and brush-up activities related to the following topics: typing shorthand machine transcription good handwriting spelling, grammar adding/calculating machines duplicating procedures record-keeping procedures	See Pre-Testing Scores--work can be individualized, or total class involvement, depending on the needs.
Introduction of New Units	Develop skill and knowledge toward an OFFICE CAREER.	Some of the above-named might be new to all or some students. *Other topics might include: mail handling correspondence office standards (mailability, etc.) filing forms typing attitudes, business ethics telephone techniques following instructions applying for a job	Topics for introduction can be correlated with student choice of occ-models and based on the skills and knowledges which will be utilized. (See Appendix for model descriptions)

* Such units can be taught individually or in groups at any time during the semester or year. In-Service Training at designated times might be scheduled during interim periods (between models); or set up as a result of class debriefings. Individual workers may have special needs; and these too, might indicate taking a break from the job, for in-service training in order to become more familiar with necessary skills and knowledge.

CLASSROOM BECOMES "AN OFFICE"

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Student INPUT	Develop student enthusiasm, interest, and understanding	Briefing Sessions	Students provide INPUT, teacher takes back seat.
		Rearrange desks and equipment	Cooperate with fellow teachers.
Integrate OE Units	"Office Environment," "Supplies" "Files" "Record-keeping" "Forms Control" "Mail Handling" "Time-Cards" "Payroll" "Ethics"	Prepare company supplies	Cut, stack, count, inventory
		Central Supply Closet and Control System	Company supplies
		Design and duplicate needed forms*	Your own supply forms* (developed within your particular office; i.e., Supply Requisition, Inventory Sheets, Time-Cards, Payroll, etc.)
		Set up files--individual and/or Central Files	
		Prepare working papers, label and file	
		In-Out baskets	Cover boxes with contact paper
		Name-plates for desks	Made by students
		Outgoing Mail Box	Covered--mail once deposited should be accessible to supervisor or office manager only.
		Time cards,* (time clock--real or simulated)	Simulates attendance, punctuality
		Payroll system*	Simulates grading or evaluation

* See pp. 59-67--FORMS examples

CLASSROOM BECOMES "AN OFFICE" (continued)

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Establish Office Rules and Procedures	DUAL PURPOSE: (1) Students gain better understanding of "actual office"	Establish office rules and procedures	SEE pp. 68-72 for example of an Office Manual for internal office operations.
	(2) Teacher gains clerical and classroom "administrative" help	* Establish "Office Positions"--could be any number from 1-3 student positions. These can be rotating or applied-for positions.	** Suggested titles for classroom positions: (1) administrative assistant or office manager, (2) receptionist-clerk, (3) simulator (outside world, as in Telephone Clerk occ-model), (4) time and payroll clerk.

*SEE pp. 55-67 for complete explanation of Office Simulation implementation, and possible forms which could be developed.

**SEE pp. 73-78 for job descriptions of internal office (full-scale simulation).

JOB APPLICATION

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Teacher's Pre-Planning	Job Interviews	Make arrangement for interviewer(s) Designate a student receptionist, or former OE student (graduate)	* PHASE VII, CHECKLIST 18, Form B Interviewer(s) could be: principal, counselor, business people, advisory committee member, school board member. Interviewer(s) could be manager or office worker in a business(s) similar to the actual job.
Student's Activities	Apply for the job(s) of their choice.	Write letter of application, resume', fill out application blank	Present materials to interviewer(s). * PHASE VII, CHECKLIST 18, Form C, C-1
Student Interview	Simulate actual interview	Interview(s): since many jobs are involved (occ-models/ students), several could be conducted at once, providing facilities are available	* PHASE VII, CHECKLIST 18, Form D, D-1 SEE pp. 24, 25--FORMS
Follow-up	Hired/Not Hired	Evaluate job applicants ** Applicants "not hired" are counseled to apply for other positions.	If a panel (of interviewers) did the interviewing, they jointly discuss and select applicants. Based on applicant's qualifications, aptitudes, etc., they might be advised to look for work elsewhere.
Class Follow-up	Understand why or why not employees are hired.	Class discussion--using panel's interview comment forms.	

JOB APPLICATION (continued)

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Hired	All have a job.	List of Company Employees posted.	
Job Orientation	First day on the job.	Fill out W-4 forms, Time Cards, receive Company Manual.***	This is the final step, used only after every student has been placed.

*Vocational Office Education for Tomorrow's World, North Dakota Coordinator's Manual, Bismarck, ND 1971.

**A program with 10 - 15 students, for instance, will have a number of available jobs from which to consider (24 positions in 19 different companies).

***Employees on the job leave their work at the office. Therefore, it is strongly recommended that all occ-model materials always remain at school.

APPLICATION BLANK

PERSONAL

Name _____ Telephone No. _____
(Print) Last First Middle (Maiden)

Address _____ Social Security Number _____

Type of work preferred _____

If accepted, when can you start? _____ Salary Desired _____

☐ Male ☐ Female ☐ Married ☐ Single ☐ Other _____ Height _____ Ft. _____ In.

Date of birth _____ Weight _____ Lbs.
Year Month Day

Are you a citizen? _____ If not, do you intend to remain permanently in the United States? _____

How much time have you lost on account of illness in the last two years? _____ Explain _____

Have you any physical impairments? _____ Describe _____

EDUCATION

Type of School	Name & Address	Dates Attended From	Dates Attended To	Diploma or Degree	Major Course
High					
Business or Secretarial					
College					

What business machines can you operate? _____

Typing speed _____ words per minute Stenography speed _____ words per minute

Are you presently enrolled in courses of study? _____ If yes, explain _____

EMPLOYMENT

Describe below in detail all employment (full-time and part-time). Begin with your most recent employment and work back consecutively to your first job since leaving high school or college. Attach extra sheet if necessary.

Length of Employment	Firm Name	Street Address	City & State
From _____ Mo. _____ Yr.			
To _____ Mo. _____ Yr.			
Total _____ Yrs. _____ Mos.	Type of Business	Your Title	Supervisor's Name, Title & Tel. No.
Latest Earnings _____ Wkly.			
Reason for Leaving	Duties		

Length of Employment	Firm Name	Street Address	City & State
From _____ Mo. _____ Yr.			
To _____ Mo. _____ Yr.			
Total _____ Yrs. _____ Mos.	Type of Business	Your Title	Supervisor's Name, Title & Tel. No.
Latest Earnings _____ Wkly.			
Reason for Leaving	Duties		

I hereby affirm that the information given in this application is true and that I have not knowingly withheld any fact that would, if known, tend to react unfavorably upon the consideration of my application for employment. I understand that any misstatement or omission of a material fact may be cause for dismissal.

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_____ _____
Date of Application Your Signature

INTERVIEW APPRAISAL

	Negative	Fair	Good	Excellent
1. Interest in the job				
2. Eye contact				
3. Ability in oral expression				
4. General appearance				
5. Attitude				
6. Courtesy, cooperation				
7. Personality, poise				
8. Self-confidence				

COMMENTS:

LETTER OF APPLICATION

RESUME

APPLICATION FORM

PUBLIC RELATIONS

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Teacher Pre-planning	Gain approval and support of your administration	Prepare brief summary of Occ-Model instructional plan, purposes, etc.	SEE pp. 28-30--News Release Examples.
Public	Inform	Informal (teacher) Formal (w/students)	Personnel to remember: administration, guidance department, fellow teachers, other school staff, parents, PTA, students (not yet enrolled), Advisory Committee, school board; business, professional, and civic organizations; community.
Student INPUT	Involve students-- it's "their office"	Briefing Sessions... News Releases (radio, TV, school paper and/or local paper) Student-written letters of invitation Open House Special Meetings Develop brochure	SEE pp. 31-32--Open House Suggestions.
Integrate with OE Units	Business Communications, speech, telephone technique, preparation of special programs, typing programs, clerical and poise-developing activities. Also responsibility, detailed "follow-through"-- getting permission, procuring materials, equipment, etc.	"Time-Off" from Occ-Model work, perhaps two (2) days weekly during which letter writing and composing, speech, program planning, etc., is taught--and carried out in the P-R activity.	* PHASE VIII, CHECKLISTS 21, 22 Forms (all) * PHASE X, CHECKLIST 29, 30 Forms (all)

PUBLIC RELATIONS (continued)

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Community-School (VOE/program) Contact	Develop cooperation and understanding between business and education.	Job Interviews Field trips to local Occ-Model companies. B-I-E Day. Speakers (literature, helps, aids, etc. from the local businesses and offices) Open House Spring Tea	Student-based If you have used local businesses and offices represented in the occ-models, you might follow up at the end of the semester (year) with an "appreciation activity." (SIMILAR TO COOP BANQUET)

NOTE: Although this Public Relations Activity is begun by the teacher prior to the beginning of the office education program, different activities should be worked out only after "all systems are GO"--so that students are actively and enthusiastically involved. Before an Open House, Tour, or Special Meeting for the entire school or community, office activities should be operating smoothly.

*Vocational Office Education for Tomorrow's World, North Dakota Coordinator's Manual, Bismarck, ND 1971.

"ROUGHRIDER" OFFICE—This is the scene at Lisbon High School's office education classroom as local students take part in the field-testing of North Dakota Occupational Models, which have been developed by the University at Grand Forks. A real office atmosphere is simulated to lend realism and aid the students in learning business practices.

Lisbon students take part in field testing

Lisbon High School office education students are participating in the field-testing of North Dakota Occupational Models, which have been developed by the University of North Dakota.

Under the supervision of Mrs. Doris Stroh, instructor and coordinator of vocational office education, the class has recently completed work on a model built around the daily work of a typist in a county welfare office.

Copies of actual forms and reports were typed as students become "employees" of Roughrider County Welfare and Social Services Center.

To lend realism to the simulation, the furniture is arranged in office fashion with outbaskets and name cards on each desk. Correspondence is signed, sealed, and "mailed" when it meets office standards.

"I felt I learned more by on-the-job training than by just learning things from a book in class," commented Barbara Lukes in her evaluation of the project. Cindy McGregor said, "It helped me learn to follow instructions."

Within the next week, these same students will become employees of Northland Chemical Company and perform the duties of a secretary for that firm as they test the materials of the second Occupational Model.

NEWS RELEASE (example) Add details, names, dates, and all pertinent information about your own program.

CAREER CLUSTER CONCEPT--OCCUPATIONAL MODELS
IN OFFICE PRACTICE

North Dakota Occupational Models are self-contained instructional packets developed from actual offices in the state. They provide a realistic educational experience for students unable to participate in a cooperative office education program. Models may also be used, however, to broaden and enrich the cooperative work experience. For instance, if a student's on-the-job assignment is a bookkeeping station, he may desire to work through a bookkeeping model in the classroom either concurrently with, or prior to, the actual job situation.

The career cluster concept is a built-in feature of the model plan. If a student is working toward a career goal as a secretary, he may select stenographic-secretarial models from a variety of fields such as banking, insurance, medicine, education, or agriculture. On the other hand, a student may be uncertain about his specific positional aptitudes and intersts under the broad umbrella of office occupations, and desire to explore. Should he have already found a particular type of business appealing, such as the insurance field, he might select an in-depth program by taking all model positions--clerical, bookkeeping, stenographic, and secretarial--within that company.

The 24 models, plus a teacher's handbook, were distributed to North Dakota vocational office education coordinators in August 1973. Every model contains a student's kit, a teacher's kit, and a company and procedures manual.

These unique North Dakota-based curriculum packets are the result of materials gathered from businesses throughout the state. Following initial interviews with 69 companies, 171 office employees participated in the data-gathering process. They submitted detailed daily log sheets for a one-month

period, together with actual forms and work procedures information.

Models are vocationally flexible. They prepare students for work in small, medium, or large offices. They are also instructionally flexible, allowing implementation in small, medium, or large schools. From the variety of model difficulty levels provided, this instructional plan is suitable for high-, average-, or low-ability students. The model design allows the student wo work independently, and at his own pace.

The North Dakota Occupational Model Plan seeks to duplicate many of the demands, pressures, and problem-solving activities confronting an actual worker. Here the student becomes an employee and learns to apply his previously learned basic skills and knowledge to the job. Now he rotates, not from machine to machine, but from an actual office position to another, utilizing "real" office projects. He may also discover if his perception and expectations of the office environment and the world of work has been realistic, evaluating himself in terms of adjustment to the role of an office employee.

OPEN HOUSE (or Tea) SERVES EDUCATIONAL NEED

INTEGRATED LEARNINGS

1. Human relations
2. Decision-making, planning, organizing
3. Communications - oral, written
4. Typing, duplicating, assembling, distributing
5. Attitude and Character development - responsibility, cooperation, etc.

OBJECTIVES

1. Learners will demonstrate cooperative effort toward a specific goal--a successful Open House.
2. Learners will demonstrate effective planning, organization, and decision-making abilities in the carrying out of the committee assignments, and in individual responsibilities.
3. Learners will demonstrate poise in social situations, including hospitality, serving refreshments, helping visitors feel welcome, public speaking (introductions, announcements, and presentations).

PROCEDURE

1. Present the idea of an Open House to students after gaining administrative approval. Students should select the committees needed, select a general chairman, committee chairman, and have volunteers for committee membership. The teacher is an honorary member (only) of all committees.

2. Committees and/or full group:
   a. discuss guests to invite.
   b. discuss appropriate dress and behavior for the occasion.
   c. discuss committee meetings--arrange meeting times and reports.

3. The teacher should continually stress that it is <u>their</u> Open House and express confidence in their ability to handle it. The teacher's function is that of advisor.

COMMITTEES AND RESPONSIBILITIES

1. Program: Personnel select program; determine presentations and who should give the short speeches. Determine topics, a Master of Ceremonies, etc. as required.

2. Hospitality: Personnel are assigned to greet guests, make informal

introductions, keep the guest book, hand out programs, see that there are enough seats and places to hang coats.

3. Food: Personnel plan refreshments, order supplies, prepare and serve food.

4. Program preparation: Personnel design, prepare, type, complete as well as check with other committees for accuracy of information.

5. Set-up: Committee members obtain needed facilities, equipment, and "props," (following regular school procedures, such as requisitions, forms; go through correct channels to gain permission, etc.)

6. Clean-up: Committee members return facilities and equipment to regular arrangement (or see that janitor does), return props, small items, clean up, etc.

7. Evaluation: Personnel report results of workshop, open house, or tea in written form to all personnel following event.

8. Public Relations: Personnel contact news media, professional and civic organizations, administration, teachers and students, parents, and other guests; prepare letters of invitation, news releases, and school announcements and skits.

DESIRED OUTCOMES

1. Development of poise, cooperative attitudes, personal responsibility, and high standards of quality.

2. Learning the details of organizing and carrying out a social/professional function; decision-making and follow-through abilities.

3. Development of students' self-confidence; and their ability to work as a team.

4. Effective public relations to stimulate community and school interest in the program.

5. Community awareness of opportunity offered Vocational Office Education students; as well as potential employer contacts for students.

PROBLEMS, QUESTIONS AND SUGGESTED SOLUTIONS

PROBLEM OR QUESTION	SUGGESTED SOLUTION(S)	COMMENTS
"How can working papers be used more realistically?"	Take out of kit, cut apart, use, file, etc. When work is completed, have student retrieve working papers and reinsert in labeled envelopes or folders for next employee.	Be prepared to reproduce papers when they become frayed or torn.
"Some models have too many duplicating projects--budget doesn't allow use of so many masters and paper."	Use duplicating projects at your discretion. Preparing a master for the supervisor's approval is often sufficient.	Some lower-ability students may need more practice than others. Allow these students to complete the projects.
"I don't have time to prepare dictation materials."	Allow students in the pre-orientation and preparation period to dictate. Use machine transcription belts if you have the equipment available, or cassettes or tape recorder for shorthand students.	Students learn dictating and "Future Executive" skills.
"Students become bored on a long routine job--one project called for typing 200 (2 x 3) cards."	Use this type of project for building skill and speed in production typing. Consider such projects as indicative of a 2,000 card job. Many office positions have boring, routine tasks.	CAREER EXPLORATION: If students find they are bored, indicate that they probably should not apply for, nor accept, such an office position in the future.
"Our first model experience did not seem realistic enough to real office experience."	"With the second model I used the contingencies more freely. Dropping one of these "rush" items in the employee's in-basket with a deadline provided more realism."	CONTINGENCIES are effective for any level student when used as "office pressure" demands.
"My Supervisor's Kit was delayed in the mail--did not arrive 'til two weeks after starting model work. I wondered, 'What do I do now???'"	"I found that my students (without the teacher's crutch) had to make more decisions on their own...It was very good for all of them!"	Students need not be "spoon-fed," can be resourceful and creative when the situation demands.

PROBLEMS, QUESTIONS AND SUGGESTED SOLUTIONS (continued)

PROBLEM OR QUESTION	SUGGESTED SOLUTION(S)	COMMENTS
"Many of my students had had no previous bookkeeping training... several problems."	"I stressed good handwriting and the importance of posting every day... Another innovation was to use the 5 students with bookkeeping background as Office Managers (tutors) for the others."	Good instructional technique... develops confidence; requires review "in order to aid" others.
"Students were unfamiliar with check-writing, and other banking procedures."	After a few days' work on this model, we stopped our office work for In-Service Training--a short unit on banking procedures.	This method is helpful to students after they encounter problems--the instruction is more pertinent to their current needs.
"I was looking for some specific helps for teaching a short filing unit."	"After one model rotation we used all the carbon copies produced to set up a central filing system--and continued by adding to this file with the next model."	Students had already worked with the papers during the production (model job)... "It was easier to teach the four methods, plus coding, indexing, etc. with familiar materials...Full-size letter and form copies provided a much more realistic filing experience than using a practice set."
"I wanted our job application and interviews to be more realistic."	"Personnel from similar companies (to the model businesses) agreed to participate in our OE program by coming to the school and conducting interviews."	This is REALISM--PLUS!

PROBLEMS, QUESTIONS AND POSSIBLE SOLUTIONS (continued)

PROBLEM OR QUESTION	POSSIBLE SOLUTION(S)	COMMENTS
"I wanted the model projects to be more realistic...did not want students to see what job was coming next... and also wanted the flexibility of omitting some projects for selected students."	"So I decided to give workers the Company and Procedures Manual only. Thus I kept all employee kits, filing projects in labeled folders. Then I dropped one project at a time in their in-basket."	This, too, is realism. It involves more work (administrative, control, records, etc.), but the administrative assistant (student manager) could be assigned this responsibility.
"I wanted more decision-making and student-involved administrative activity.	"So I assigned four (student) office managers--one in charge of each division or branch office. They were responsible for mailable standards, input, output, office discipline, etc."	Again--realism. Students gain more in realistic human relations and responsibility.

EVALUATION

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
ACCEPT/REJECT sheet	Daily or project checking	After proofing, check opposite the Acc/ or /Rej, to indicate whether the material is acceptable for mailing, must be corrected, or must be re-done.	Criteria: Would YOU sign this, and mail it out, knowing that it represents you and your company? SEE p. 39.
Subjective Evaluation sheet	Attitude checklist	Mark at end of project, or during work on this job, at your discretion.	If this becomes a part of your total evaluation for the student, criteria is established at your discretion. SEE p. 39-a.
Self-Evaluation sheet	Employee sets his own goals; evaluates self in light of goals.	Student reads performance goals of model job, sets his own goals prior to becoming an employee on this job; evaluates self at end.	Criteria: student-determined, teacher-determined, or group-determined. Probably would differ from student to student, and job to job. SEE p. 40.
Formative Evaluation	De-briefings	Student INPUT: informal periodic sessions, small or large group.	Based on evaluation. In-Service Training may sometimes be designated as needed.
Formative Evaluation	Individual Conferences	Student/Teacher sessions to determine progress and individual needs.	Based on results. In-Service Training may be helpful.
Summative Evaluation	Meet school's grading standards--teacher's, students', and parents'.	Payroll system: "Grades could equal earnings; "errors" or work rejected could equal deductions. Other deductions could reflect absenteeism, tardiness, poor use of supplies, attitudes, etc.	SEE p. 58. Rather than deductions (negative approach), BONUSES might be used to emphasize positive achievements.

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
		Percentages: One program used the following criteria-- 1. quality 20% 2. quantity 20% 3. extra supplies 10% 4. attendance 10% 5. tardiness 10% 6. filing 10% 7. practice 10% 8. use of time 10%	This breakdown might be rather complicated...but if standardized, it might be worth a try.
Summative Evaluation	Meet school's grading standards--teacher's, students', and parents'.	One program administered a Post-Test (same as Pre-Test)	SEE p. 14. for suggested resource material for testing.
Attitude Rating Scale - Student's sheet	Student determines own attitude--Counseling Aid	Student rates himself in relation to attitude, the occ-model class, and his ability to find a job (self-confidence)	SEE pp. 41, 42. This is used at the end of the program. (Not at the end of each model job).
Attitude Rating Scale - Teacher's sheet	Comparison technique; use with the student's attitude-rating scale (above).	Teacher fills out an Attitude Rating Scale on each student and compares with student's rating. Class-discussion, generalities Individual conferences--helps the student to understand himself, his needs in relation to work, as well as to people and self.	SEE pp. 43, 44. Use positive approach. Do not point out any one student's weaknesses.

EVALUATION (continued)

SUBJECT	PURPOSE	SUGGESTED ACTIVITIES	COMMENTS
Program Evaluation	Determine effectiveness of the occ-model plan with individual students, and correlate with total class--or other students and classes.	Administer the STUDENT OPINIONNAIRE when a student completes mo[illegible].	SEE pp. 45, 46.

EMPLOYEE EVALUATION FORM

EMPLOYEE Susan Schwartz (Tgp 103) DATE March 1-30

COMPANY: NOKATO STATE BANK MODEL: SECRETARY

INDIVIDUAL PROGRESS CHART

PROJECT NUMBER	DESCRIPTION	ACC - ACCEPT REJ - REJECT ACC/REJ	REMARKS
1-1	Transmittal - Aker	X / ✓	no "Comments" what was transmitted?
1-2	Letter w/Envelope - Applegate	✓ /	
1-3	Letter w/Envelope - Tompkinson	✓ /	
1-4	Letter w/Envelope - Jacobson	✓ /	
1-5	Letter w/Envelope - Thompson	✓ /	
1-6	Transmittal - Christenson	X / ✓	no "Comments"
1-7	Letter w/Envelope - Longview	✓ /	
1-8	Letter w/Envelope - Green	✓ /	
1-9	Transmittal - Pike	✓ /	
1-10	Letter w/Envelope - Roseland	✓ /	
1-11	Letter w/Envelope - Lotus	✓ /	
2-1	Transmittal - Aker	/	
2-2	Minutes - Board of Directors	/	
3-1	Transmittal - Green	✓ /	
3-2	Stencil - Form Letter - Opening Checking Account	X / ✓	too high on p.
3-3	Stencil - Form Letter - Certificate of Deposit	✓ / ✓	" " " "
3-4	Transmittal - Aker	✓ /	
3-5	Stencil - Form Letter - Closing Checking Account	✓ /	
3-6	Stencil - Form Letter - Past Due Letter	✓ /	

SUBJECTIVE EVALUATION

EMPLOYEE'S NAME _____ DATE _____

OCCUPATIONAL MODEL _____

POSITION HELD _____

	No Opinion	Poor	Fair	Average	Good
1. Evidenced ability to follow instructions					
2. Conscientiousness about work					
3. Use of judgment and imagination (if needed)					
4. Appearance					
5. Attendance					
6. Initiative					
7. Courtesy to fellow employees					
8. Courtesy to Supervisor					
9. Response to written and/or oral instruction					
10. Overall attitude toward work					

For Office Supervisor: If you needed an employee in the company on which this worker was assigned, would you hire this applicant? _____

COMMENTS:

EMPLOYEE'S SELF EVALUATION

EMPLOYEE NAME_____ DATE_____

OCCUPATIONAL MODEL_____

Look over this Self-Evaluation sheet before beginning work for this company. Set your goals. Fill this out at the completion of the Model. Any comments which you desire to be strictly confidential will be considered so.

MY PERSONAL GOALS FOR THIS MODEL

QUESTIONS OR PROBLEMS ARISING ON THIS MODEL

POSSIBLE SOLUTIONS

RECOMMENDATIONS

EVALUATION:

	Yes	No
Did I accomplish my personal goals on this model?	___	___
Did I show improvement		
in skills?	___	___
in speed of performance?	___	___
in efficiency?	___	___
in knowledge?	___	___
in decision making?	___	___
As an employee working for this company, was I		
loyal?	___	___
diligent?	___	___
responsible?	___	___
As an employee sharing office space, equipment, supplies, was I		
cooperative?	___	___
courteous?	___	___

ATTITUDE RATING SCALE FOR STUDENTS (questionnaire for students after participating in class)

Directions: Circle the numbered response that most closely reflects your own attitude.

Sliding Scale

1----------2----------3----------4----------5

1. Did you show initiative and ambition while enrolled in this class?	req'd prodding, shirked your responsibilities	did the req'd work	found things to do without supervision
2. Were you quality conscious?	careless worker	reasonable standards	high standards
3. Did you cooperate with other students (when needed)?	worked with others	worked reasonably well with others	went out of your way to help others
4. Did you respond to constructive criticism?	responded negatively	accepted constructive criticism	sought constructive criticism
5. How was your attendance?	missed more than average	about the same as average	missed very little
6. Were you a discipline problem?	req'd frequent discipline	req'd some discipline	self-disciplined
7. Did you feel you could succeed in an office occupation before you took this class?	no	might succeed	confident you could succeed
8. Did you feel you would succeed in an office occupation after you took this class?	no	might succeed	confident you could succeed

9. Did you have sufficient skills for an office occupation before you took this class? (at time of enrolling)

1----------2----------3----------4----------5

minimal skills | some skills; might be sufficient | skilled enough to be a satisfactory worker

10. Did you have sufficient skills for an office occupation after you took this class?

1----------2----------3----------4----------5

minimal | some | satisfactory

11. Did you have sufficient knowledge to gain an office job before taking the class? (time of enrolling)

1----------2----------3----------4----------5

minimal | some; might be sufficient | much; definitely satisfactory

12. Did you have sufficient knowledge to gain an office job after taking the class?

1----------2----------3----------4----------5

minimal | some | much

13. How much effort did you put forth? (during the class)

1----------2----------3----------4----------5

some | reasonable | much

ATTITUDE RATING SCALE FOR TEACHER (questionnaire for teachers of participating students)

	1	2	3	4	5
1. Did he show initiative and ambition?	Required prodding, shirked his responsibilities.		Did the required work.		Found things to do without supervision.
2. Was he quality conscious?	Careless worker.		Reasonable standards.		High standards.
3. Did he cooperate with other students (when needed)?	Worked with others.		Worked reasonably well with others.		Went out of his way to help others.
4. Did he respond to constructive criticism?	Responded negatively.		Accepted constructive criticism.		Sought constructive criticism.
5. Attendance	Missed more days than most students.		Missed about as many as the average student.		Missed very little.
6. Was he a discipline problem?	Required frequent discipline.		Required some discipline.		Self-discipline.
7. Did he feel he would succeed in an office occupation before he took this course?	No.		Might succeed.		He was confident that he would succeed.
8. Did he feel he would succeed in an office occupation after he took this class?	No.		Might succeed.		He was confident that he would succeed.
9. Had sufficient skills for an office occupation before he took this class? (at time of enrolling)	Minimal.		Some skills; might be sufficient.		He was confident his skills were adequate.
10. Had sufficient skills for an office occupation after he took the course?	Minimal.		Some.		Skilled enough to be a satisfactory office worker.
11. Had sufficient knowledge to gain an office job before taking the class? (time of enrollment)	Minimal.		Some; might be sufficient.		Much.

ATTITUDE RATING SCALE FOR TEACHERS (continued)

12.	Had sufficient knowledge to gain an office job <u>after</u> taking the class?	Minimal.	Some.	Much.
13.	How much effort did he put forth? (while in the class)	Some.	Reasonable.	Much.

STUDENT OPINIONNAIRE

OPINIONNAIRE: For students after completing occupational model instruction.

Directions: Please circle the numbered response that most nearly reflects your own feelings. Circle one response for each question.

	1	2	3	4	5	6
1. Do you think you learned as much in this class as you would have with regular textbook materials?	much more	little more	about the same	less than	much less	not sure
	1	2	3	4	5	6
2. When you needed help on some phase of the Occupational Model, where did you usually find the answer?	Procedures Manual	a reference book	teacher	classmate	made own decision	other
	1	2	3	4	5	
3. Now that you have participated in the Occupational Model plan of instruction, how do you feel about it as a method of learning?	enjoyed it very much	enjoyed it somewhat	no particular feelings	disliked it somewhat	disliked it very much	

4. To what do you attribute your feelings (as marked in No. 3)? Check more than one, if applicable:

1. more like a real office
2. learned more about a specific career
3. learned more about a type of business
4. freedom to work at my own rate
5. individual help from the teacher
6. adequate explanation before the work began
7. inadequate explanation before the work began
8. not enough help from the teacher
9. had to take too much responsibility (make own decisions, find answers, etc.)
10. did not seem to learn much about office work

COMMENTS:

5. If you were to take this class again, which method of instruction would you prefer?

_____1. occupational model

_____2. regular textbook and classroom instruction

_____3. both the occupational model and regular textbook/classroom instruction

_____4. other _____

_____5. not sure

6. Now that you have worked for a North Dakota company(ies), would you like to apply for this/these positions?

_____Yes _____No

7. If yes, which one(s)?

8. Why or why not? (refers to item 7, above)

9. Since working for North Dakota companies, do you think you would like office work?

_____Yes _____No

10. Why or why not? (refers to item 9, above)

CHAPTER III

INDIVIDUAL DIFFERENCES

The North Dakota Occupational Model plan allows for individual differences. The brief descriptions summarized (in Appendix) contains an evaluation of each model in terms of difficulty level. During the pilot test, in which approximately thirty to fifty students participated on each model, the 18 teachers ranked models based on the range of abilities of the students in their particular class. Thus the ability-level of each model as defined on the description sheet has been established through action research, as well as through analyzing other plans throughout the United States.

A review of literature was also conducted as part of the exemplary program activities. The next few pages summarize some of these findings, as related to both the less-than-average ability student and the exceptional or gifted student.

From the list of clerical duties shown on pp. 49, 50, you will note the type of job activities which, according to research, low-ability persons have proved they can successfully perform. It is hoped that the information presented on the following pages will help you select those models and those particular projects within selected models which will be most suitable for your students. Although each model has been evaluated, as stated, you may wish to refine this selection process to meet the needs of your particular situation.

Research has verified that there are jobs available in the business world for students with less-than-average ability. Not only are these positions available, but it is a fact that the major employment opportunities for students in the lower one-third (in general scholastic ability) will be in business.

But only if they receive appropriate pre-employment training.[1]

The low-ability and educationally disadvantaged student generally has the following characteristics:[2]

1. He has an intelligence quotient of 90 and below.
2. He has an inadequate self-image.
3. He lacks successful experiences which condition him for failure and demoralize him to the extent of creating a negative self-image and low estimate of his own competencies.
4. He is unable to communicate adequately, either in writing or in speaking.
5. He is one or more years behind his age group in school.
6. He is frequently tardy, absent, or truant.
7. He is apathetic or indifferent toward school.
8. His education does not meet his need for occupational training, and frequently seems unrelated to his world.

Further research has shown the general characteristics of office jobs for which low-ability youth may be employed,[3] including:

1. The job is comprised of simple tasks, relatively few in number, which can be learned in over-the-shoulder training in a relatively brief period of time.
2. No specific areas of knowledge are required; although ordinary ability to read, write, and do simple arithmetic are assumed to be requisite.
3. No previous work experience is required.
4. Jobs require knowledge of only a few specific procedures.
5. Jobs require ability to follow oral and written instructions.
6. Jobs are ordinarily repetitive, requiring little originality or resourcefulness.
7. Jobs ordinarily require little or no planning, organizing, or developing on the part of the employees.
8. It has little need for independent action or judgment.
9. Accuracy and other standards of performance usually are important.
10. Work is under immediate supervision.
11. Jobs may deal with people, things, or both.

Wells determined in her doctoral study that the most common type of clerical job classifications filled by low-ability employees are mail or messenger clerk,

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[1]Elvin S. Eyster, "Implications for Business Teacher Education," NABTE Bulletin 84, National Business Education Association, 1966.

[2]Victor Van Hook, "Business Education for the Disadvantaged," NABTE Bulletin 86, National Business Education Association, 1967, p. 8.

[3]Elvin S. Eyster, "Preparing the Lower One-Third in General Scholastic Ability for Business Employment," Journal of Business Education, February 1966.

clerk-typist, file clerk, mechanical machine operators, receptionist, and general office clerk.[4]

Business employers were also asked to list the type of clerical duties they consider opportunities for low-ability persons in the business world. They stated they would be willing to hire the low-ability for:[5]

Duplicating and related work

a. Stapling materials
b. Photocopying
c. Collating
d. Operating folding machines
e. Operating stencil duplicators

Stock work

a. Physically distributing stock
b. Tagging stock
c. Counting merchandise

General office work

a. Keeping office neat
b. Running errands
c. Checking supplies

Clerical work

a. Typing form letters
b. Alphabetizing and sorting
c. Filing
d. Filling in printed forms

Office machines

a. Full keyboard adding machine
b. Ten-key adding machine

Secretarial and stenographic work

a. Sending telegrams

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[4]Patricia Wells. "A Profile of Office Employment Opportunities for Low-Ability Personnel in Twenty Selected Metropolitan Areas throughout the United States." Unpublished Ph.D. Dissertation, University of North Dakota, 1971.

[5]Ibid.

b. Making appointments
c. Proofreading
d. Receiving callers

Data Processing

a. Key punch
b. Verifier

Everyone is "disadvantaged" to a degree--in at least several areas. Everyone is also talented, perhaps even "gifted," in some area as well. All students, at the opposite ends of the scale as well as the average, must be challenged. Sometimes the advanced student gives a teacher more concern than the lower-ability person.[6]

Tonne states, "These students should be expected to accomplish more in a given period of time and also engage in projects of an increasing degree of difficulty and with a wider range of problems."[7]

Yet the teacher needs to be certain that he does not merely initiate gimmicks to keep the academically successful occupied, busy, and out of trouble. Such plans are immediately suspect, and the bright student will only too quickly understand the motive if he is assigned more work than his peers.

It is true that the characteristics of the exceptional student include the ability to complete work ahead of others, are more creative, original, etc. Yet he should not be penalized nor punished simply because he can do more work in less time and often with better results.

Tonne further states that "activities should be so planned and structured

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[6]Calfin W. Taylor, "Be Talent Developers as Well as Knowledge Dispensers," Today's Education, December 1968.

[7]Herbert A. Tonne and Louis C. Nanassy, "Business Education and the Academically Talented," Principles of Business Education, 4th ed., McGraw-Hill Book Company (New York: 1970).

so that each student can achieve goals close to his highest potential," and that teachers should "provide these students with exercises that call for a higher level of problem solving than that given to other students in the class."[8]

With this in mind, the teacher using the occupational model plan can help guide his students toward applying for those jobs which call for less clerical activity and more decision and problem-solving ability. Not only may these students apply for those positions labeled "challenging" (model descriptions, Appendix), but they can be encouraged to apply for an internal office position involving increased responsibilities such as administrative assistant, office manager, or bookkeeper. Rather than defining their role too circumspectly, the teacher should allow all the room possible for the expression of creativity, resourcefulness, responsibility, and decision making.

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[8] Ibid.

Personal characteristics must be considered, but in conjunction and simultaneously with the analysis of the total work situation. Where there is an office there is a work group with people; and where there are people there is social interaction and human relations problems.[11]

From investigations into employer opinions of why people do not succeed on the job, it is apparent that human relationships are almost as important as the basic skills so far as the requirements for good office workers are concerned.

Approximately two-thirds of the total incidents reported in the NOBELS study involved the worker's perception of his role expectations within the formal system. Part of the study defined in behavioral terms the characteristics, attitudes, and traits of workers relative to the social context of office work. The incidence of ineffective behaviors reported in situations involving social interaction were almost twice as high as effective behaviors reported in the same situations.

Such findings, reports Calhoun, possess significant implications for the improvement of this phase of the preparation of office workers in terms of more accurate expectations of their role within the work group.[12]

Thus it is imperative in the occupational model plan, as well as in any vocational office education program, to involve students in social and work group interaction as much as possible. Those programs which initiate an internal office situation lend themselves more readily to developing social interaction.

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[11]Fred S. Cook and Edward Gary Shapiro. "Factors Associated With Successful Adaptation to the Secretarial-Stenographic Role." Research Project Final Report. Wayne State University: October 1968, 451 pages ERIC #ED 040297.

[12]C. C. Calhoun. and Bobbye J. Wilson. "New Office and Business Education Learning System." National Business Education Association Yearbook, No. 8. Washington, D.C.: National Business Education Association 1970, pp. 40-59.

The occupational model plan serves as a vehicle through which the student may gain more accurate perceptions about the world of work and his role as an office worker.

Frequent briefing and de-briefing sessions are not only effective in motivating student creativity and problem-solving abilities, but provide a base for hashing out human relations problems when they occur. They also provide a feeling of belonging, and develop the spirit of team-work, a most important phase of social-role acceptance for the individual.

CHAPTER V

FULL-SCALE SIMULATION

MODEL OFFICE

Girl Friday, Inc. is a public stenographic agency. The product it sells is "office services." Their goal is to make a reasonable profit based on quality and reputable service to companies, offices, and business people of the local community.

Stenographers, typists, clerks, and bookkeepers take dictation, type reports, perform clerical activities, and provide a variety of services to their clients.

Internal operation of the company includes several positions besides the employees who work directly and only with client activities. These personnel are as follows:

Receptionist
Office Manager - Bookkeeper

Clients of the business are, in reality, the 24 occupational models. Each individual project is filed behind that client's company name. The simulator (outside world) acts as various personnel from these firms and brings work orders (individual projects) to employees at Girl Friday, Inc. Customers will not pay their bills--much less return again--unless all materials produced are quality work.

Girl Friday, Inc. develops the distribution schedule for the simulator, so that within the office operation there is no contact with Occupational Models, as such. The client, of course, brings his Company Manual and Procedures Manual to the employee with whom he works, so that she in turn has ready access to the way his specific company operates.

A large-scale simulated office can easily be developed by using additional internal office personnel. Girl Friday, Inc. at Fargo South is designated as a branch office, with billing and other accounting procedures conducted elsewhere. For the more ambitious or larger OE programs, a Home Office could also be included. (See pp. 73-78 for job description of Home Office.)

STEPS IN SETTING UP FULL-SIMULATION

GIRL FRIDAY*

Students	Teacher		
	X	1.	Selected first 8 occupational models--based on ability level of students enrolled in the program.
X	X	2.	Established jobs and job descriptions for internal office operation of Girl Friday: (a) office manager (b) receptionist (c) stenographers (d) clerk-typists
X	X	3.	Coded supply lists from all (24) models; card file established (see page 65 for example)
X	X	4.	Central supply files established--following client name (model companies), and file folders prepared.
X	X	5.	Girl Friday office forms prepared (designed, typed, duplicated, filed)
X		6.	Duplicated and filed client supplies needed (from supply lists in models; filed according to code established in 3, 4, above)
X	X	7.	Defined job descriptions for internal office.
X	X	8.	Prepared Girl Friday Office Manual (wrote material, typed, duplicated, made available for later use). See pages 68-72.
X	X	9.	Room arrangement and decoration. Included in both teacher and student input were the needs and wishes of other students and teachers who use the room, as well as the janitor. Students chose where they would sit and with whom.
X	X	10.	Pre-testing: (One week) Based on OE units; test covered basic office skills, typewriting, shorthand, machines, etc.
X		11.	Students prepared their own graphs, recording the class average and plotting their scores. (See page 15.)
	X	12.	Pre-Simulation: (One week) A help-wanted ad appeared on the bulletin board: "WANTED: employee with typing and transcription skills for work in a secretarial services branch office. Write Box 243, Fargo Forum, stating qualifications."
X			(a) Students wrote 3 letters asking for permission to use names.
X			(b) Letter of application, and resume'.

Students	Teacher		
X	X	(c)	Interviews conducted with students
	X	(d)	Follow-up: Students were hired (two for each of the first models chosen as Girl Friday clients).
X		(e)	New workers received the Company Manual and Procedures Manual for their particular client, in order to become familiar with that company.

GIRL FRIDAY SECRETARIAL SERVICES "OPENS ITS DOORS FOR BUSINESS"

X	X	13.	Receptionist and office manager of Girl Friday met with the executive vice-president (teacher) for a briefing session. (They remained on their jobs for one week, at which time they trained another worker for the job. They moved to positions as stenographers or clerk-typists, working for clients.)
X		14.	New employees reported to the Office Manager, who required them to fill out W-4 forms with the receptionist. After receiving their Girl Friday Office Manual (see page 68) they reported to their assigned work stations.
	X	15.	Executive vice-president prepared a weekly work input sheet for the Office Manager. This listed worker's names, together with clients and specific daily projects. (Since there were two employees assigned to each client, it was the responsibility of the office manager and the two employees involved as to distribution of work load.)
X		16.	Incoming mail (daily projects were submitted through the mail, as appeared on the list in 15 above). Receptionist posted mail received. Mail was then submitted to office manager for handling and distribution. Handling included preparing a Work Order (see p. 64)
X		17.	Stenos and clerk-typists procured needed supplies through the receptionist from clients' supply folders. Completed work as described; prepared client invoices based on charges in Girl Friday Office Manual; and prepared materials for proper distribution--(also listed in Office Manual).
X		18.	Office manager checked completed work, ready for mail.
X		19.	Receptionist prepared outgoing mail--recorded postage expense.
	X	20.	Executive vice-president received mail (for checking against supervisor's key, and follow-up).
X		21.	Payroll prepared weekly (see Office Manual). Office manager evaluated employees on Friday before leaving her position.

Students	Teacher	
X		22. As stenographers and clerk-typists gained confidence and proficiency with the operation of their secretarial services company, new clients were added. (additional model input, based on ability-level of OE student workers, and difficulty-level of models available)

EVALUATION: Based on:

(1) quality and quantity of work produced
(2) office manager and executive vice-president's weekly evaluation of employees
(3) attitudes and effectiveness in social-interaction activities (These included: accepting instructions, criticism; giving supervision; working together as a team to complete client work orders on time; ability to work under pressure; use of supplies and equipment; etc.)

GIRL FRIDAY, INC. is located at Fargo South High School. Executive vice-president is Mrs. Cathie Ferguson.

FORM W–4 (Rev. July 1969)
Department of the Treasury
Internal Revenue Service

Employee's Withholding Exemption Certificate

Type or print full name _____ Social Security Number _____

Home address _____ City _____ State _____ ZIP code _____

EMPLOYEE:
File this form with your employer. Otherwise, he must withhold U.S. income tax from your wages without exemption.

EMPLOYER:
Keep this certificate with your records. If the employee is believed to have claimed too many exemptions, the District Director should be so advised.

HOW TO CLAIM YOUR WITHHOLDING EXEMPTIONS

1. If SINGLE (or if married and wish withholding as single person), write "1." If you claim no exemptions, write "0" . . . .
2. If MARRIED, one exemption each is allowable for husband and wife if not claimed on another certificate.
   (a) If you claim both of these exemptions, write "2"; (b) If you claim one of these exemptions, write "1"; (c) If you claim neither of these exemptions, write "0" . . . . .
3. Exemptions for age and blindness (applicable only to you and your wife but not to dependents):
   (a) If you or your wife will be 65 years of age or older at the end of the year, and you claim this exemption, write "1"; if both will be 65 or older, and you claim both of these exemptions, write "2" . . . . .
   (b) If you or your wife are blind, and you claim this exemption, write "1"; if both are blind, and you claim both of these exemptions, write "2" . . . . .
4. If you claim exemptions for one or more dependents, write the number of such exemptions. (Do not claim exemption for a dependent unless you are qualified under Instruction 4 on other side.). . . . . .
5. If you claim additional withholding allowances for itemized deductions fill out and attach Schedule A (Form W–4), and enter the number of allowances claimed (if claimed file new Form W–4 each year) . . . . . .
6. Add the exemptions and allowances (if any) which you have claimed above and enter total . . . . . ☐
7. Additional withholding per pay period under agreement with employer. (See Instruction 1.) . . . . . $

I CERTIFY that the number of withholding exemptions and allowances claimed on this certificate does not exceed the number to which I am entitled.

(Date) _____ 19____ (Signed) _____

o48—16—80515–1

This card covers _____ to _____

School _____

Name _____

Reg hours _____

OT hours _____

All overtime & loss time to be recorded on the reverse side & approved by the immediate supervisor.

Supervisor's Signature _____

	1st day	2nd day	3rd day	4th day	5th day	6th day	7th day	Total
Second Week	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	
Total	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	IN OUT IN OUT	First Week
	1st day	2nd day	3rd day	4th day	5th day	6th day	7th day	

Signed _____

TIME RECORD

WEEK ENDING_____

NAME	MON.	TUES.	WED	THURS.	FRI.	SAT.	TOTAL	REGULAR	OVERTIME

Calculating Hours Worked

PAYROLL SHEET

For Week Ending _____

NAME	TOTAL HOURS	HOURLY RATE	REGULAR EARNINGS	EARNINGS FOR OVERTIME	TOTAL EARNINGS	DEDUCTIONS			NET AMOUNT PAID
						F.I.C.A. Tax	INCOME TAX WITHHELD	GROUP INSURANCE	
TOTAL									

EARNINGS RECORD

Name _____ Address _____

Social Security No. _____ Employment Title _____

Withholding Exemptions _____ Earnings Rate _____

No.	Week Ending	Date Paid	Total Hours		Earnings			Deductions			Net Pay
			Regular	Overtime	Regular	Overtime	Total	FICA	Inc. Tax With.	Total	
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
	Subtotals										

No. _____

_____ 19___

To _____

_____

For _____

_____

	DOLLARS	CENTS
BAL. BROT FORWARD		
AMOUNT DEPOSITED		
TOTAL		
AMOUNT THIS CHECK		
BALANCE		

No.

GIRL FRIDAY, INC.
SECRETARIAL SERVICES
FARGO, ND 58102

1-30
210

_____ 19___

PAY TO THE ORDER OF _____ $_____

_____ DOLLARS

CITIZENS NATIONAL BANK

_____

71

INCOMING MAIL REGISTER

DATE RECEIVED	SPECIFIC ITEM	FROM	DISPOSITION

WORK ORDER

DATE_____NAME_____NO._____

BILL TO_____

ADDRESS_____

PICK UP_____WHEN_____WE MAIL_____HOW_____WHEN_____

DELIVER TO_____WHEN_____CALL WHEN READY_____

INSTRUCTIONS

STENO'S TIME

_____8½ x 11 double spaced

_____ w/tab or numerical date

_____ letter, single-space

legal_____double-space

_____single-space

_____dbl-sp, w/tab date

_____carbon copies

_____envelopes, lines

_____cards, labels, etc., lines

_____blue legal binders

_____folders

_____other

TOTAL

TAX

FINAL TOTAL

Plus One Carbon

STEELE PUBLIC SCHOOLS 030
SECRETARY

SUPPLIES NAME	SUPPLY #	REORDER PRICE
Transmittal Forms	30-01	.05
Letterheads	30-02	.05
Lunch tickets	30-04	.05
annual	30-04-1	.05
monthly	30-04-2	.05
weekly	30-04-3	.05
Lunch receipts	30-03	.05
Payroll sheets	30-05	.05
Title III Application Forms	30-06	.05
Commodity Request Forms	30-07	.05
Commodity Receipt Form	30-08	.05
Transcript Record Form	30-09	.05
Purchase Order Forms	30-10	.05

SUPPLIES REQUISITION
Steele Public School

Date_____

Supplies Needed:

_____

_____

_____

_____

Signed

73 A

GIRL FRIDAY

SECRETARIAL SERVICES

Fargo South Fargo, ND 58102

I N V O I C E

Invoice No.

SOLD TO: DATE:

TERMS cash charge

DATE	QUANTITY	DESCRIPTION	CHARGES	TOTAL
			TAX	
			TOTAL	

customer

Date_____

POSTAGE EXPENSE

DATE	TO WHOM SENT	WEIGHT	COST

GIRL FRIDAY

SECRETARIAL SERVICES

Fargo South Fargo, ND 58102

O F F I C E

H A N D B O O K

H O U R S O F W O R K

A N D
C O M P E N S A T I O N

Workday

The workday for our company is from 10:27-12:01 Tuesday, 10:27-12:01 Thursday, and 11:17-12:01 Friday.

Workweek

The company workweek is from Tuesday through Friday.

Time Cards

You are to clock in and out, 10:27 a.m.-12:01 p.m. Tuesday and Thursday, and 11:21 a.m.-12:01 p.m. Friday. The time clock is located in the coffeeroom of the Administration Building. You are expected to have clocked in and be ready for work by the above times.

On Friday of each week, you and the office manager will verify the accuracy of the entries and total the number of working hours. When you receive your paycheck, you are to sign your Time Card to certify that your check is correct. Any question may be discussed with the office manager.

Salary

The sum you receive in your pay check is very important to you. That sum may grow larger through merit increases. The salary scale and how increases are received will be explained to you by your office manager or the Vice President. Dividends from profits which your division office earns will be distributed quarterly. This amount will depend to a great extent on the contribution each employee of your division

makes. Therefore, your attendance and cooperation is needed at all times.

Payday

Every Friday is payday. You will be paid by check for work done the week prior to the one in which payday occurs. When payday falls on a holiday, or a day when the office is closed for any other reason, you will be paid the day before. Your office manager will explain anything you do not understand about your pay check. "End of fiscal year" Bonus Checks will go to employees of the division producing most.

Pay Scale:

Office Managers	- $2.15
Bookkeepers	- 2.10
Stenos	- 2.05
Clerk-Typists	- 2.00

Each position has a level of responsibility commensurate with the pay scale. Merit increases can be earned, as well as promotions, as employees show evidence of competence and productivity. Dividends are divided among the employees on the basis of profit earned by the whole division staff--and distributed according to the percent of lines produced by each employee during that earning period. Therefore, it might be quite possible for clerk-typists to earn as much or more than their office manager.

Salary Deductions

Following are the three salary deductions required by law to be made from your gross pay: Federal Income Tax, which is based on the exemption claimed by you on the Employee's Withholding Exemption Certificate which you filled out. Official Federal Income Tax tables are used; Social Security, or F.I.C.A. (Federal Insurance Contributions Act); and North Dakota State Income Tax.

O F F I C E P R A C T I C E S

Each employee is an important part in the smooth operation of an office. Courtesy and simple good manners are essential when many people work together. Certain office practices must be followed.

All work is confidential and should not be discussed with anyone.

Decorum

Your conduct should be that of a business person at all times. Such conduct does not include loud and boisterous conversation, sitting on desks, constant moving about, or other acts which disturb others.

Housekeeping

To do an efficient job, you should keep your work area neat and orderly. Only those materials necessary to do the job at hand should be on your desk. Place your purse under your desk and out of the aisle. Be certain it is closed at all times.

Company Equipment and Supplies

Machines and other equipment represent a big investment. Listed below are some general

instructions to follow in machine care:

- Uncover your typewriter and place the cover inside your desk.
- Be certain to clean all machines, particularly the mimeograph, the liquid-process machine, and the typewriters after using them.
- Check to see that all electrical equipment is turned off before leaving.
- Notify office manager if you have any difficulty with faulty machines.
- Cover machines no longer in use.
- Supplies and printed forms are costly. Exercise care in their use. Return all unused supplies to the proper place.

Grievances, Recommendations, etc.

"Do not carry a grudge." If you feel you have been treated unjustly, discuss the matter with your office manager--not with your fellow workers.

During the day, make it a policy to write down questions, problems, or suggestions as they arise, which may concern technical aspects of your job or equipment--questions of policy or morale problems.

Work Procedures

- Check instructions carefully on the Work Orders before beginning to type. Retyping because instructions have not been followed is much more time-consuming and temper-triggering than asking questions beforehand.

- Check the delivery or mailing date on all Work Orders. It is senseless to type a job for day after tomorrow before completing those that must be typed and delivered today. Keep things in their proper perspective.

- Check the Word Order Basket periodically. Don't neglect our customers or a "Ruch" order!

- When a Work Order is completed, put it on your office manager's desk. Do not interrupt other people's activities by visiting. Comment only if it is necessary to explain some aspect of the job to be done. Remember: When you are visiting with another person, twice as much is not being done!

A T T E N D A N C E

No pay will be received for absences. Sick leave--1 day for every 30 work days (or approximately six weeks); remember, though, that every hour you are out, your division suffers.

Although an employee's personal life is his own to do with as he wishes, remember too, that if your hours away from the office are not well-disciplined, your effectiveness on the job will be impaired--and again--your division suffers.

GIRL FRIDAY
SECRETARIAL SERVICES - CHARGES

Rates are based on standard 8½ x 11 and legal-size sheets; divide proportionately, according to half or off-sized materials.

Straight-typing

8½ x 11	double-spaced	1.25
	w/tab or numerical data	1.50
	letter, single-sp	1.50
legal-size	double-sp	1.50
	single-sp	2.00
	d-sp, w/tab data	2.00

Dictation/Transcription, time rate

Hour	6.00
Half-hour	3.00
Quarter-hour	1.50

Exact time should be placed on the Work Order Sheet (rounded off to nearest quarter-hour)

* If stenos work too slowly, we will lose our clients to other Secretarial Services; therefore do not dawdle, causing an excessive charge to be rendered.

* The client should be told that additional charges will be made if the copy from which we are typing is hard to read or must be edited.

Other Charges

carbon copies, each	.05
envelopes addressed (each line)	.05
cards, labels, etc. (each line)	.05
blue legal binders	.10
folders	.50

* When there is no question concerning billing, stenos and typists may get invoices from the bookkeeper's desk and make them out.

* The customer will get Copy 1 with work (invoice)

Copy 2 of invoice with work order (Copy 1) goes to Head Office

Copy 3 of invoice with work order (Copy 2) goes to manager or his assistant for filing

Head office handles all billing.

OFFICE MANAGER

Oversees Work (Helps others)

Forwards Work Orders

Keeps Employer Earnings Record and Payroll Register

Prepares Payroll and Time Cards

Reconciles Bank Account (or receipt)

Checks or Completes Invoices

Checks Work Slips

Records Individual Employee Progress

Evaluates Work of Division Employees

Sends Out Letters of Introduction to Customers

RECEPTIONIST

Greets Visitors, shows them around

Supply Room and Requisition

Assists office manager

Takes Care of Petty Cash

Records Incoming Mail in Register

Records Postage in Postage Allocation

Types letters for office manager

Handles Office Files

STENOS AND TYPISTS

Work for Companies

Fills out Invoices

Work Slips

(See Manual)

JOB DESCRIPTIONS - INTERNAL OFFICE POSITIONS
(Suggested for large-scale simulation; including Home Office Accounting Department)

POSITION	PURPOSE	ACTIVITIES, DUTIES	COMMENTS
Office Manager	Supervises the office, second only to the teacher, (who becomes the employer or vice-president of the company)	Chairs the briefing and de-briefing sessions Responsible for all office employees Responsible for input to employees Responsible for output from employees Follows instructions given by the employer, and carries out these responsibilities Makes suggestions to management (owner) regarding office procedures, office functions, office policies and guidelines. Responsible for preparing the payroll Evaluates subordinates	This may be a rotational position; involves much responsibility and should therefore not be rotated among <u>every</u> student. Can be an applied-for position, or appointed (promoted) by the employer. Subject to the employer's choice of how much and to what extent full or partial responsibility is given.

LARGE-SCALE INTERNAL OFFICE POSITIONS (continued)

POSITION	PURPOSE	ACTIVITIES, DUTIES	COMMENTS
Bookkeeper (or Accounting Clerk)	Maintains financial records and accounts.	Prepares invoices for services rendered Keeps accounts receivable Keeps accounts payable Posts to ledgers, journals Receives incoming checks, payments Prepares bank deposits Prepares checks for accounts payable Reconciles bank statements Prepares income tax forms, qrtly. government reports, etc.	Public Stenographic Bureau--with customers, accounts receivable, accounts payable, etc. This person works closely with and under the supervision of both the office manager and the employer. Accounts receivable include: income from clients (Occupational Model Companies) for services rendered. Accounts payable include: salaries operating expenses taxes equipment maintenance insurance capital improvements supplies and equipment etc.

LARGE-SCALE INTERNAL OFFICE POSITIONS (continued)

POSITION	PURPOSE	ACTIVITIES, DUTIES	COMMENTS
Receptionist	Represents the office; much social contact and interaction required in this position	Greets visitors; directs them to office manager, employer, or gives them a tour of the office. Takes telephone calls Keeps schedules, appointments, the company calendar, etc. Is responsible to office manager and employer Distributes daily and inter-office mail - incoming Picks up daily and inter-office mail - outgoing; also prepares out-going mail for pick-up	Where the public relations activity is implemented, this may occur frequently When telephone equipment is available. Even with the part-time use of the Tele-trainer this can be effective.

LARGE-SCALE INTERNAL OFFICE POSITIONS (continued)

POSITION	PURPOSE	ACTIVITIES, DUTIES	COMMENTS
Clerk: Supplies, Files	Maintains records and inventories	Responsible for supplies inventories supplies, dispenses supplies when employees present requisition duplicates extra supplies as needed maintains all records relative to supplies on hand, supplies used, etc. Responsible for files files material as required prepares file materials retrieves materials as required keeps files updated Assists other clerks, office manager, and employer as requested	May or may not help design special internal office forms needed May or may not help design file system

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LARGE-SCALE INTERNAL OFFICE POSITIONS (continued)

POSITION	PURPOSE	ACTIVITIES, DUTIES	COMMENTS
Clerk: Payroll	Facilitates attendance and earnings records	Responsible for time card preparation	May or may not be responsible for designing, duplicating time cards.
		Responsible for calculating attendance records from time cards	
		Prepares payroll checks	May or may not be responsible for calculating earnings minus deductions.
		Keeps earnings records updated, both individual and total office	
		Files and maintains payroll records	May assist in designing the file and record system.

LARGE-SCALE INTERNAL OFFICE POSITIONS (continued)

POSITION	PURPOSE	ACTIVITIES, DUTIES	COMMENTS
Simulator (simulates all "outside world" contacts)	Develops a more realistic internal office situation	Simulates according to the employer's and/or office manager's directions. Bank - prepares and mails bank statements to simulated office. Customers - walk-in, telephone-in, mail-in...	The Telephone Clerk is the one model which definitely requires having a simulator. Depending on the extent of the simulation's realism, the teacher may add many activities for the simulator. If the internal office is a public stenographic bureau, for instance, the simulated customer would bring in individual projects from models as work orders for the stenos and typists... Salesmen, etc.

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APPENDIX

MODEL DESCRIPTIONS

Secretarial - General Office Positions

Kidder County Agent	Secretary
Steele Public School	Secretary to Superintendent
Northland Chemical Company	Secretary
United Hospital	In-Service Secretary
Crabtree Insurance Agency	Stenographer
Western Potato Service	Personnel Secretary
Pioneer Mutual Life Insurance	General Stenographer
Minot Builders Supply	Secretary
Fargo Schools	Secretary
Nokato State Bank	Secretary

Clerk-Typist Positions

State Farm Insurance Company	Clerk-Typist
Hugo's Piggly Wiggly	Clerk-Typist
Roughrider County Welfare	Typist
Minot Builders Supply	Clerk-Typist
Northern School Supply	Accounting Clerk
Crabtree Insurance Agency	Insurance Rating Clerk
Northwestern Bell Telephone Company	Telephone Clerk
Roughrider County Welfare	Eligibility Clerk

Bookkeeping Positions

Crabtree Insurance Agency	Bookkeeper
Barta Building Supply	Bookkeeper
Farmers Union Oil Company	Bookkeeper
Minot Builders Supply	Bookkeeper
Nokato State Bank	Teller-Bookkeeper
Steele Farmers Elevator	Bookkeeper-Office Manager

See following pages for job descriptions, equipment utilized on the job, and recommended qualifications.

Secretarial - General Office Positions

KIDDER COUNTY AGENT SECRETARY (basic)

The secretary is responsible for a variety of duties that the Kidder County Agent assigns. The employee files, types reports, letters, listings, and numbers. Material is transmitted in longhand or corrected copy.

Equipment: typewriter, duplicator, adding machine
Qualifications: typewriting

STEELE PUBLIC SCHOOL SECRETARY TO SUPERINTENDENT (basic)

This position requires completing a variety of duties that a secretary may have to do for a superintendent in a small high school. A considerable amount of typing is included in the preparation of reports, ordering supplies and commodities, and preparing transcripts and letters.

Equipment: typewriter, duplicator, adding machine
Qualifications: typewriting

NORTHLAND CHEMICAL COMPANY SECRETARY (basic)

The employee is responsible for typing letters on stencils; completing forms for insurance and consignment purposes; and preparing materials for proper distribution.

Equipment: typewriter, duplicator, adding/calculating machine, transcribing maehine
Qualifications: typewriting, shorthand or machine transcription skills

UNITED HOSPITAL* IN-SERVICE SECRETARY (intermediate)

Typing is a major activity in this position. Letters, minutes of meetings, policy revisions, memos, bulletins, and purchase requisitions and orders, are indicative of the secretary's duties. Posting from notices, filing and retrieving, are also daily responsibilities. Some degree of imagination is needed in preparing attractive designs on bulletin board memos.

*Contains working papers. These should be cut, labeled (project no.), and filed in project envelopes prior to model activity.

Equipment: typewriter, duplicator
Qualifications: typewriting

CRABTREE INSURANCE AGENCY STENOGRAPHER (intermediate)

The stenographer works closely with the agent (owner), as well as with the other two employees (Insurance Rating Clerk and Bookkeeper). Activities include: typing correspondence, memos, and reports from rough draft; taking dictation or transcribing from machine; preparation and typing of

budgets, forms and reports; handling incoming and out-going mail.

Equipment: typewriter, duplicator, adding/calculating machine, transcribing machine
Qualifications: typewriting, shorthand or machine transcription skills

PIONEER MUTUAL LIFE INSURANCE COMPANY STENOGRAPHER (intermediate)

Secretarial-pool assignments typify this position. Responsibilities include: filing, right-margin justification (news article); duplicating; dictation and transcribing; typing.

Equipment: typewriter, duplicator, adding machine, transcribing machine
Qualifications: typewriting, shorthand or machine transcription skills

WESTERN POTATO SERVICE PERSONNEL SECRETARY (intermediate)

Activities include: completing personnel records; preparing forms; composing and typing correspondence; and maintaining company personnel records and files.

Equipment: typewriter, duplicator, adding machine, transcribing machine
Qualifications: typewriting, shorthand or machine transcription skills

FARGO SCHOOLS SECRETARY (intermediate)

The employee takes dictation, transcribes; types correspondence, forms and reports; record-keeping related to 17 school audio-visual accounts, including equipment and inventory charts.

Equipment: typewriter, duplicator, adding machine, transcribing machine
Qualifications: typewriting, shorthand or machine transcription skills

MINOT BUILDERS SUPPLY SECRETARY (intermediate)

The secretary takes dictation and transcribes materials; prepares reports (including determining percentages and making revision decisions); duplicates materials; verifies and posts to accounts; and types a variety of forms and items.

Equipment: typewriter, duplicator, adding/calculating machine, transcribing machine
Qualifications: typewriting, shorthand or machine transcription skills (bookeeeping and office machines helpful)

NOKATO STATE BANK SECRETARY (advanced)

This position covers a wide variety of general secretarial skills applied to a medium size commercial bank, including: tvping letters, financial statements, board minutes, and forms and reports.

Equipment: typewriter, duplicator, adding machine, transcribing machine
Qualifications: typewriting, shorthand or machine transcription skills (bookkeeping and office machines helpful)

Clerk-Typist Positions

STATE FARM INSURANCE COMPANY CLERK-TYPIST (basic)

The employee types various insurance forms (applications, policies, etc.) and correspondence, from handwritten notes and forms as well as from corrected copy. Filing operations are also among the clerk-typist's duties.

Equipment: typewriter
Qualifications: typewriting

HUGO'S PIGGLY WIGGLY CLERK (basic)

The clerk works with basic grocery store operations, including: the preparation of reports; handling currency; typing daily cash register receipts and payroll reports; processing utility payments; and preparing advertising copy.

Equipment: typewriter, adding machine
Qualifications: typewriting

ROUGHRIDER COUNTY WELFARE TYPIST (intermediate)

The employee is responsible to any office personnel in the office. Activities include: preparing transcripts from rough draft reports; typing from transcribing machine belts; and completing detailed information on numerous types of forms.

Equipment: typewriter, adding machine, transcribing machine
Qualifications: typewriting, machine transcription skills

MINOT BUILDERS SUPPLY CLERK-TYPIST (intermediate)

The employee types letters, memos, forms, and reports from rough draft; verifies invoices and reports; files and performs various clerical duties.

Equipment: typewriter, duplicator, adding/calculating machine, transcribing machine
Qualifications: typewriting

NORTHERN SCHOOL SUPPLY* ACCOUNTING CLERK (intermediate)

The clerk performs the same basic tasks every day and the work procedure is fairly routine once the employee is familiar with the daily operations. These include: verifying, recording, and processing of incoming checks

and invoices; preparing outgoing checks, and daily bank deposit. The clerk also occasionally types purchase orders, acknowledgments, and correspondence.

*Contains working papers: These must be removed from kit, cut to size, and filed in labeled daily envelopes prior to model activity.

Equipment: typewriter, adding/calculating machine
Qualifications: typewriting, record-keeping fundamentals

CRABTREE INSURANCE AGENCY INSURANCE RATING CLERK (advanced)

The employee is responsible for rating insurance policies for automobile and homeowner insurance applicants. Activities include: re-rating policies that expire, renewing policies; ordering policies; completing invoices; and maintaining files.

Equipment: typewriter, calculator
Qualifications: typewriting; ability to follow detailed written instructions; and some computational ability.

NORTHWESTERN BELL TELEPHONE COMPANY * TELEPHONE CLERK (challenging)

The telephone clerk is responsible for:

1. customer contact - often talks with customers over telephone, taking necessary action to handle requests.
2. clerical duties - maintains records and files necessary to perform customer contact and collection work (for 25 customer accounts).
3. record-keeping - keeps customer accounts up-dated at all times so that customer contact is accurate and efficient.

*An "outside-world" simulator (customer) is essential. Working papers must be removed from kit, cut to size, and filed in labeled envelopes prior to model activity.

Equipment: typewriter, telephones (at least two connecting phones), adding machine
Qualifications: typewriting; ability to make decisions under pressure, and remain poised, courteous, and patient.

ROUGHRIDER COUNTY WELFARE* ELIGIBILITY CLERK (very challenging)

The employee works with initial food stamp applications under the government-administered welfare program. Responsibilities require the ability to: understand federal-state plan manual instructions; account for money; sell food stamps; conduct banking and correspondence activities; verify, transfer, and assemble data from numerous government report forms.

*Contains working papers: must be removed from kit, cut to size, and filed in labeled envelopes, prior to model activity.

Equipment: typewriter, adding/calculating machine
Qualifications: typewriting; ability to understand complicated written instructions, and prove one type of report data against data from other sources.

Bookkeeping Positions

CRABTREE INSURANCE AGENCY BOOKKEEPER (intermediate)

The employee is responsible for: posting to journals, cash ledgers, accounts receivable ledger, and the cash book; as well as routine correspondence and filing. Daily posting to accounts is essential, as well as legible handwriting, and accuracy in computational work.

Equipment: typewriter, adding/calculating machine
Qualifications: typewriting, bookkeeping

BARTA BUILDING SUPPLY BOOKKEEPER (intermediate)

The bookkeeper coordinates books, records, billing, buying and selling practices of a small retail lumber company. Activities include: monthly billing procedures; banking duties; and typing letters and addressing envelopes, plus a variety of daily activities.

Equipment: typewriter, adding machine
Qualifications: typewriting, record-keeping or bookkeeping

FARMERS UNION OIL COMPANY BOOKKEEPER (intermediate)

The employee is responsible for: bi-weekly payroll; the daily bank deposit; bank reconciliation; daily recap sheets; and composing correspondence.

Equipment: typewriter, adding/calculating machine
Qualifications: typewriting, bookkeeping

MINOT BUILDERS SUPPLY BOOKKEEPER (advanced)

Bookkeeping, typing, and office machines activities typify the responsibilities of the bookkeeper in this branch office. Posting to journals and customer statements; maintaining inventory; and processing billing procedures are among the duties.

Equipment: typewriter, adding/calculating machine, duplicator
Qualifications: typewriting, bookkeeping

NOKATO STATE BANK* TELLER-BOOKKEEPER (advanced)

The employee performs many detailed checking and balancing activities, requiring both patience and concentration.

*Contains working papers. These must be removed from kit, cut to size, and filed in labeled envelopes prior to model activity. Materials provided simulate walk-in customers to the bank teller's window.

Equipment: typewriter, posting or billing machine (typewriter can substitute), adding/calculating machine
Qualifications: typewriting, bookkeeping, (office machines helpful)

STEELE FARMERS ELEVATOR BOOKKEEPER-OFFICE MANAGER (advanced)

The employee is responsible for buying and selling of grain (with grain prices as a governing concept); performing banking duties; recording daily sales; writing checks; preparing insurance reports; reporting taxes; and composing correspondence.

Equipment: typewriter, adding/calculating machine
Qualifications: typewriting; bookkeeping; ability to make decisions